

# ProExpress User Manual

---

*Rev 3.0*

*Last Updated April 6, 2015*

## **Contents**

Prerequisite.....	3
ProExpress Conventions.....	3
Accessing ProExpress .....	4
Building an Order .....	5
Review/Modify the Shopping Cart.....	8
Deleting an Item from the Cart.....	8
Placing an Order.....	9
Special Features .....	10
Copying an Order .....	10
Printing an Order .....	10
Exporting an Order.....	11
Generate a Customized Report of Orders .....	11
Additional Troubleshooting .....	12
Attention Required List on Line in Shopping Cart.....	12

## Prerequisite

For the best experience, please be sure to use one of the following supported browsers:

- Internet Explorer
- Firefox
- Chrome

## ProExpress Conventions

ProExpress has several basic conventions employed throughout the application. The following sections review these basic conventions.

- **Required fields** are text entry fields that require information in order for the system to operate. These field names are denoted by an (\*) and are required fields. A user must provide information for these fields to continue building your Customer, Contact, Quote, etc.
- **The Info Icon**  denotes entered information is either invalid or needs additional input. For example, if you enter alphabetical characters in a field that requires a numerical entry, the Info icon appears.
- **Drop down menus** (or option lists) display a menu when clicked. They allow the user to type information into the box or select an item from the list. For example, if you want to add a customer's address, the State Option list allows you to choose the state or type it. As you type, the list scrolls based on the initial entry letters.
- **Tool tips**-briefly appear to display a tool name and function. Direct your mouse pointer above a tool to display the tool tip
- **Inactive Options** –When an option appears in gray, the option is inactive (not available for use). Inactive Options may mean that you need to enter more information in other areas to activate the grayed options.
- **Immediate Save** allows users to progress through the ProExpress application without manually saving Orders, or anything else. As soon as the user clicks off a field that field is saved. Seamlessly Create, Edit , or Navigate between entities while progress is saved automatically along the way

## Accessing ProExpress

ProExpress is accessible through the Partner Portal.

1. Launch any compatible browser and navigate to <https://portal.allegion.com/>
2. Login with your credentials when prompted

User Name

Password

Need help with your Password?  
Forgot your User Name?

To sign up or resolve issues with your account, please contact:  
- Your local Company Admin  
- Your Allegion Company Representative  
- Allegion Portal Admin Support (MyAllegion.Support@allegion.com)

3. Navigate to My Resources then to ProExpress Online Ordering

Products    My Support    My Account    My Learning    My Resources

My Security Technologies Portal

Knowledge Center

ProExpress Online Orders (circled in red)

Marketing

Customer Promotions

Newsletters

If the link does not appear in the menu drop down, please contact your company admin or Allegion sales representative to activate your online ordering account.

4. After the application loads, the main Order Search screen will appear

The screenshot shows the 'Order Search' interface. At the top, there are two buttons: '+ New ProExpress Order' and 'Generate Report'. Below the buttons is a table header with columns: Customer, PO#, Order Type, Created by, Created on, Last Modified by, Modified on, Status, and ID. A single row of data is displayed in the table, corresponding to the order shown in the grid below. The grid has columns: Customer, PO#, Order Type, Created by, Created on, Last Modified by, Modified on, Status, and ID. The data in the grid matches the table above. At the bottom of the screen, there is a navigation bar with links for 'Page 1 of 1' and a note 'Viewing 1 - 1 of 1'.

This screen displays all submitted and open orders and is searchable via the fields at the top

## Building an Order

- After logging into ProExpress click the button located on the Order Search screen
- This will create a new shopping cart and loads the product selection grid

The screenshot shows the 'Order SOMF000002' screen. At the top, there are three tabs: 'Header', 'Items', and 'Comments'. The 'Items' tab is selected. On the right side, there are three buttons: 'Print', 'Checkout', and 'More...'. Below the tabs is a checkbox labeled 'Enable Contains Search'. The main area is a grid table with columns: SKU, Mfr, Catalog Number, Finish, Description, Price, and Quantity. The grid contains 15 rows of product data. At the bottom of the grid, there is a navigation bar with links for 'Page 1 of 89' and a note 'Viewing 1 - 10 of 882'. A blue 'Add To Cart' button is located at the bottom right of the grid area.

3. Search for a product by typing in the SKU, Manufacturer Code, Catalog Number, Finish, Description or list price or any combination of the above. As the fields are populated the list is automatically filtered to meet the search criteria.

**Order SOMF000002**

**Items**

SKU	Mfr	Catalog Number	Finish	Description	Price	Quantity
42084	FAL	SC60-18	689	MOUNTING PLATE - TOP JAMB	28.00	
42123	FAL	SC60-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
42133	FAL	SC60-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
42136	FAL	SC60-18	695	MOUNTING PLATE - TOP JAMB	28.00	
42159	FAL	SC80-18	689	MOUNTING PLATE - TOP JAMB	28.00	
42162	FAL	SC80-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
42179	FAL	SC80-18	695	MOUNTING PLATE - TOP JAMB	28.00	
42182	FAL	SC80-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
43066	FAL	SC70-18	689	NARROW FRAME BACK PLATE	47.00	
43067	FAL	SC70-18	695	NARROW FRAME BACK PLATE	47.00	

Page 1 of 2 Viewing 1 - 10 of 18 Add To Cart

Note: Checked by default, the *Enable Contains Search* in the top left corner the search will return results with any of the search criteria contained within the results. When uncheck, the search will return results that start with the search criteria.

Expert Hint-For faster results, if you know the exact product you are searching for, as listed in the price book, uncheck *Enable Contains Search*.

4. When the product is found, click the check box to the left of the line

The screenshot shows a software interface for managing orders. At the top, there's a header with tabs for 'Orders', 'Print', 'Checkout', and 'More...'. Below the header, it says 'Order SOMF000002'. There are three tabs: 'Header', 'Items' (which is selected), and 'Comments'. A search bar with the placeholder 'Enable Contains Search' and the value '18' is present. Below the search bar is a table with columns: SKU, Mfr, Catalog Number, Finish, Description, Price, and Quantity. The table contains 18 rows of data. The first row has a checked checkbox in the SKU column. The last row has an unchecked checkbox in the SKU column. At the bottom of the table, there are navigation links for 'Page 1 of 2' and 'Viewing 1 - 10 of 18'. A blue-bordered button labeled 'Add To Cart' is located at the bottom right of the table area.

SKU	Mfr	Catalog Number	Finish	Description	Price	Quantity
42084	FAL	SC60-18	689	MOUNTING PLATE - TOP JAMB	28.00	
42123	FAL	SC60-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
42133	FAL	SC60-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
42136	FAL	SC60-18	695	MOUNTING PLATE - TOP JAMB	28.00	
42159	FAL	SC80-18	689	MOUNTING PLATE - TOP JAMB	28.00	
42162	FAL	SC80-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
42179	FAL	SC80-18	695	MOUNTING PLATE - TOP JAMB	28.00	
42182	FAL	SC80-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
43066	FAL	SC70-18	689	NARROW FRAME BACK PLATE	47.00	
43067	FAL	SC70-18	695	NARROW FRAME BACK PLATE	47.00	

5. The cursor will automatically move to the quantity field for the line selected. Enter the quantity desired

- The quantity can also be directly entered for the line which will automatically select the check box noted in step 4

6. Click **Add To Cart** The line and quantity selected on the screen is populated below the product selection grid

7. Repeat steps 3 through 6 to continue adding products to the order

## Review/Modify the Shopping Cart

Each line added to the order or cart will appear below the search grid in the following table

Order Lines					Total Price:	
Line	Label	Item	Qty	UOM	Net Price	Total Price
1		CloserAccessory CloserAccessory	5	EA		
		SKU = 42123 Finish = 689  Discount = 1		Catalog Number = SC60-18PA Description = MOUNTING PLATE - PUSH SIDE	Line Details	Remove
						View Image

Heading	Description
Validate All	Validate Lines that "Require Attention" See Require Attention Section
Collapse/Expand All	Collapses or Expands the line details
Line Number	Line on which the product is ordered
Label	User Defined Field to identify the product
Item	Contains a listing of the product placed in the cart
Qty	The quantity placed in cart, can be change by clicking in the box and typing in a new number
UOM	Unit of Measure
Net Price	Buying program price of the unit
Total Price (in the line)	Net Price multiplied by the quantity
Total Price (in the header)	Sum of each lines' total price
Remove	Remove the line from the cart

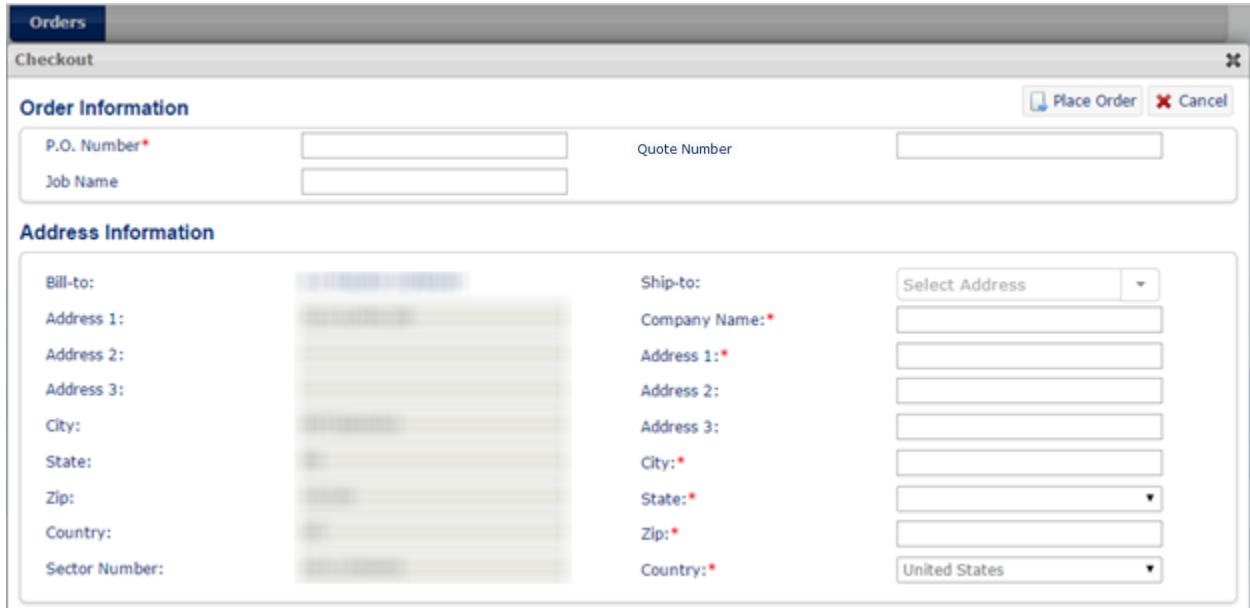
## Deleting an Item from the Cart

Click Remove on the line which should be removed from the cart

Order Lines					Total Price:	
Line	Label	Item	Qty	UOM	Net Price	Total Price
1		CloserAccessory CloserAccessory	5	EA		
		SKU = 42123 Finish = 689  Discount = 1		Catalog Number = SC60-18PA Description = MOUNTING PLATE - PUSH SIDE	Line Details	Remove
						View Image

## Placing an Order

- Once all lines have been added to the cart click  **Checkout** located in the top right of the window



The screenshot shows the 'Orders' interface with the 'Checkout' tab selected. The 'Order Information' section contains fields for 'P.O. Number\*' and 'Job Name'. The 'Address Information' section is divided into 'Bill-to:' and 'Ship-to:' sections. The 'Bill-to:' section contains fields for 'Address 1', 'Address 2', 'Address 3', 'City', 'State', 'Zip', 'Country', and 'Sector Number', all of which are blurred. The 'Ship-to:' section contains fields for 'Company Name\*', 'Address 1', 'Address 2', 'Address 3', 'City', 'State', 'Zip', and 'Country', with 'Country' set to 'United States'. There are also dropdown menus for 'Select Address' and 'Address 1'.

- Fill out all fields with an \*
- a. A quote number can also be added to an order. The system will only accept one quote number per order.
- The Bill-to information will populate automatically
- Ship-to address will be blank. The address can be populated by:
  - Typing the start of the address in the ship-to field to determine if the address is pre-loaded. Then clicking the preloaded address
  - Clicking Add New Address in the drop down, then typing in the address in the Name, Address etc. fields

- Once all information is entered click on  **Place Order** in the top right of the window
- Upon successful transmission of the order, a confirmation window will appear

## Checkout - SOMF000002

Your order has been transmitted. You will receive an order acknowledgement of purchase order number TEST FOR USER GUIDE shortly.

The Allegion order number and scheduled ship date for your order will be reflected on the relevant order acknowledgement.

Please contact Customer Care at 877-671-7011 if you do not receive your acknowledgement within 24 hours.



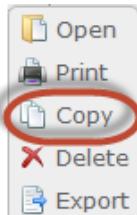
7. The order has been placed and will be received at the ship to address in 5 days.

## Special Features

### Copying an Order

To save time entering products, any existing order can be copied into a new order.

1. Click on the icon located to the left of the order that is to be copied
2. The icon will expand options for the order selected, click copy



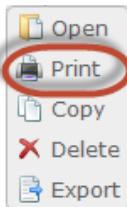
3. A new order will be created with all the lines copied for the existing order
4. This order will require validation to ensure accurate price and configuration. Click



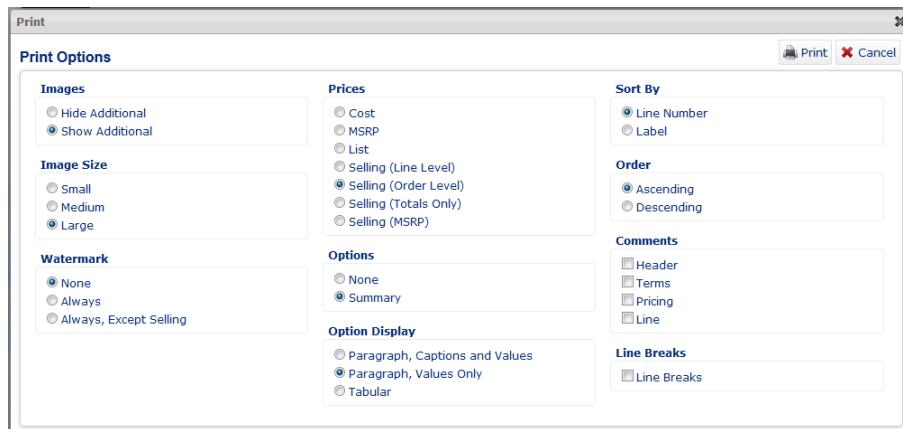
Apply the latest information and clear any validation error

### Printing an Order

1. Click on the icon located to the left of the order to be printed
2. The icon will expand options for the order selected, click Print

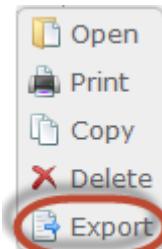


3. Select the options from the open dialog. For the most part, the defaults below provide all the information required.



4. Click in the upper right corner

## Exporting an Order



The export selection generates an XML output of the order and is currently only used for technical support.

## Generate a Customized Report of Orders



1. From the Order Search Screen click on
2. Customize the filter options as desired and click Generate Report

Generate Report

**Filter Options**

Customer	<input type="text"/>	PO #	<input type="text"/>
Created On	<input type="text"/>	Created By	<input type="text"/>
Modified On	<input type="text"/>	Modified By	<input type="text"/>
Order No	<input type="text"/>	Sort Column	Modified On <input type="button" value="▼"/>
Status	--Select-- <input type="button"/>	Sort Direction	<input checked="" type="radio"/> Asc <input type="radio"/> Desc
Order Type	--Select-- <input type="button"/>	<input type="button" value="Generate Report"/>	

3. Click  to export the report to Word, PDF or Excel

## Additional Troubleshooting

### Attention Required List on Line in Shopping Cart

77	<input type="text"/>	Lock	<input type="text"/> EA	<input type="button" value="Line Details"/>	<input type="button" value="Remove"/>
Line Instructions					
78	<input type="text"/>	Key	<input type="text"/> EA	<input type="button" value="Line Details"/>	<input type="button" value="Remove"/>
Line Instructions					
79	<input type="text"/> 	Key	<input type="text"/> EA	<input type="button" value="Line Details"/>	<input type="button" value="Remove"/>
Line Instructions					
80	<input type="text"/>	Lock	<input type="text"/> EA	<input type="button" value="Line Details"/>	<input type="button" value="Remove"/>
Line Instructions					
SKU = 043156890392 Catalog Number = B1015 DANE 134 Finish = 626 Description = PASSAGE SET 					
SKU = 043156885657 Catalog Number = KB628 SFIC E Finish = Description = IC KEY BLANK 					
SKU = 043156890415 Catalog Number = B511P6 DANE 134 Finish = 626 Description = ENTRY / OFFICE LOCK 					

To clear the highlighted lines follow the steps below

1. Click 
2. Click  to see the details of the line(s) which require attention
3. Check for BP1 error as noted in the screenshot below

[Add To Cart](#)

**Order Lines**

Line	Label	Item	Qty	UOM	Net Price	Total Price
1	<input type="checkbox"/>	Lock	1	EA	<i>Attention Required</i>	
Line Instructions						
			SKU = 043156145003	Catalog Number = D211B		
			Finish = 613	134		
			Description = CLASSRM DEADBOLT			
			Error BP1: Not open to purchase this product. Please contact Customer Care. =			
2	<input type="checkbox"/>	Lock	3	EA	<i>Attention Required</i>	
Line Instructions						
			SKU = 043156145256	Catalog Number = D211P6		
			Finish = 613	134		
			Description = CLASSRM DEADBOLT			
			Error BP1: Not open to purchase this product. Please contact Customer Care. =			

4. If error message is as above, proceed to next step. Otherwise, proceed to the step 7
5. Customer is not open to order this product. If in error contact customer care
6. To continue with the order, the line with the error must be removed from the cart. Click Remove in the far right hand corner
7. Click  **Validate All** and confirm the line no longer requires attention
  - a. If the line still has Attention Required, send an email with the a screenshot of the item to [SpeXtrahelp@allegion.com](mailto:SpeXtrahelp@allegion.com)